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**An RIA tech setup inspired by Walt Disney: Show Me Your Stack**
By Rob Burgess
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*Welcome to "Show Me Your Stack," a series from Financial Planning in which we interview those who deliver financial advice to learn what tools they rely on to make it happen. Rising client expectations are driving the need for more powerful tech tools, and we're digging deep to find out why advisors prefer certain solutions.*

Though Andrew J. Evans' office is located less than a 90-minute drive from Walt Disney World, he carries Walt Disney's ethos wherever he goes. For Evans, the CEO of Rossby Financial, an enterprise RIA in Melbourne, Florida, that means building a tech stack that's never finished, always being improved or "plussed," as Disney may have put it.

Evans, who is also the founder of fractional consulting firm ROffice, has been active in the wealth management industry for around two decades, having previously worked at Raymond James, Merrill Lynch, Charles Schwab, Waddell & Reed and TAG Advisors. Evans founded Rossby Financial in 2023.

"In my early 40s, I was looking at the landscape and said, 'I don't think there's a whole lot of opportunity for someone like myself to stay inside of a hybrid model the way that they work now. It's time to move on. Technology is advancing. Nothing is advancing here. Let's go see what we could do. Let's go stake our opportunities elsewhere,'" he said.

Today, Rossby Financial has 17 licensed advisors, four additional employees, about $370 million in assets under management and about $520 million in assets under advisement.

Evans is a self-described "big fan" of Disney — the man, the park and the brand. (His favorite Disney films include "Brave," "Aladdin" and "The Little Mermaid.")

He's such a fan that his operating philosophy is inspired by Walt Disney's approach to keeping Disneyland fresh and strong: "Something that I can keep developing, keep plussing and adding to — it's alive. It will be a live, breathing thing that will need changes," as Disney put it in a 1956 interview.

That same spirit of flexibility has shaped Evans' vision for Rossby's tech stack.

"What can you always do to make it better?" he said of his approach.

Evans is also inspired by modern Disney executives, citing Walt Disney Company CEO Bob Iger's take on innovation: "You can't allow tradition to get in the way of

innovation. There's a need to respect the past, but it's a mistake to revere your past."

Evans said it's important to him to stay flexible when it comes to the tools that help differentiate his firm.

"You can't revere something," he said, because that would lead to stagnation. "My attitude towards technology is that what's good today will not be good tomorrow. You have to find ways to immediately 'plus the park,' or always be improving your technology. So you have to build a foundation that is open to being modular."

*Scroll down the slideshow to see what Evans feels are some of the most important pieces of Rossby Financial's tech stack:*

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**CRM: Redtail and Wealthbox**
"Our organization is an enterprise RIA, so we're building our platform for pure flexibility, for whatever the individual firms that work through us want to use. We do not care what your CRM is. But most people fall into either using Redtail or Wealthbox. Those are the two most common ones.

"We gave a shot at creating a firm-supported version of Salesforce, and it's just not worth it the amount of time and focus to just get that thing set up. It's a waste of time and money."
Financial planning: RightCapital and eMoney Advisor
"Once again, our advisors use whatever they want. We were always big fans of RightCapital, because they've been good at doing their best to advance the technology forward. But many of our advisors are still using RightCapital and eMoney Advisor.

"We don't have anybody using MoneyGuidePro anymore. Elements started to get some interest, but it didn't go anywhere."

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**Portfolio management: Black Diamond**
"Black Diamond is solid. What I always liked about Black Diamond, when I originally talked to them, is that they are contextual. Most of their team, the program developers, the customer success people and so forth, they all seem to be elder millennials or younger Gen Xers. They all have a solid attitude of love and hate for technology. They're like, 'How do we make this better?' Or, 'Does this piece not work anymore? We need to do this better.' I enjoy their approach of, 'Look, if this doesn't work, we're going to fix it. But we're not going to fix it by just throwing people at it, or throwing on additional coding.' They go and rip it down to the core and then build it back up.

"They have been great to work with. They have a lot of flexibility in their system. We could manipulate things and send that data anywhere and everywhere."

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**AI-powered archiving and surveillance tool: Archive Intel**

"A lot of people look past this, but for us, we utilize Archive Intel as our archiving and surveillance tool. Once again, it's the idea of ingesting data. We can not only ingest Slack, but also Microsoft Teams, Zoom, Ring Central, websites, emails and all the social media. They're also working on Discord, which is awesome. Not so much for me. I'm still a little bit older for that, but I know that certainly advisors, maybe like two or three years younger than me, would even jump onto that. And then there's solid use of collecting data from WhatsApp, iMessage and Android messaging. When I look at client communication, I can ingest all these things.

"Working with our advisors, we take a consultative approach and say, 'Well, what do you want to do? How do you want to communicate with your clients?' And some of them say, 'I love texting, but I don't want them texting my personal number, and I need something to help control how we operate appointments and so forth.' So I say, 'We can ingest MyRepChat. So you go pay for MyRepChat and we can ingest it, and you can do a lot of business operations from it.' And then other advisors are like, 'No, I don't mind. You know, I can have clients, have my personal cell number.' Great. We run their program. It gets verified and gets pulled in. It's a lovely, simple, easy interface. It's great."

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